



**Euromonitor
International**

Hot Drinks in France

November 2025

Table of Contents

EXECUTIVE SUMMARY

Price hikes continue to influence sales of hot drinks in France

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Mixed performance for hot drinks amid local challenges and rising prices

Coffee continues to drive overall sales of hot drinks in France

Consumers consider balancing value with quality

Health and wellness trends continue to influence purchasing decisions

WHAT'S NEXT?

Challenges remain but fresh coffee beans will remain dynamic

New launches in tea likely to spur competitors

Future development to be shaped by current trends and new opportunities

COMPETITIVE LANDSCAPE

Nestlé France retains strong leadership with wide portfolio

Smaller players outperform leaders

CHANNELS

Hypermarkets retains leadership while e-commerce makes further gains

Specialists retain appeal, especially through local coffee roasters

Foodservice vs retail split

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

[Coffee in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Mixed performance for coffee in mature market

INDUSTRY PERFORMANCE

Rising prices continue to drive value sales, while retail volumes further drop

Positive perception supports dynamic performance by fresh coffee beans

Sustainability concerns place pressure on fresh ground coffee pods

WHAT'S NEXT?

Affordable sustainability of fresh coffee beans insufficient to offset retail volume decline of overall category

Recent technological improvements and new ways of consuming coffee

Emerging challenge for fresh ground coffee pods with new packaging regulations

COMPETITIVE LANDSCAPE

Nestlé retains leadership ahead of Jacobs Douwe Egberts

Players address sustainability concerns through fair trade and packaging concepts

CHANNELS

Grocery retailers lose further ground to retail e-commerce and coffee specialists

Café culture remains strong in France despite various challenges

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

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[Tea in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premium and healthy tea options appeal to discerning consumers

INDUSTRY PERFORMANCE

Ongoing appreciable value growth and stable volumes for tea in 2025

Positive health perceptions support green tea and fruit/herbal tea

WHAT'S NEXT?

Tea set to record stable but undynamic performance over the forecast period
More players to invest in digital and technological advancements in tea
Cold infusions fail to appeal but there is potential for other niche tea options

COMPETITIVE LANDSCAPE

Unilever retains slim lead over dynamic Foods International
Dynamic growth for various players, including for private label in fruit/herbal tea

CHANNELS

Grocery retailers lead distribution, while e-commerce makes further gains
Rising interest in specialist teas in France

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025
Table 38 - Retail Sales of Tea by Category: Value 2020-2025
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

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[Other Hot Drinks in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Other hot drinks remains challenged by rising prices and health concerns

INDUSTRY PERFORMANCE

Further price rises and unhealthy image reduce demand for other hot drinks
Positive performance by other plant-based hot drinks driven by nostalgia and health trends

WHAT'S NEXT?

Less time for breakfast, lactose intolerance and sugar concerns – the main threats for other hot drinks
New ingredients needed to shift consumer attitudes
Brands to focus on healthier options and local production

COMPETITIVE LANDSCAPE

Nestlé maintains dominance in other hot drinks with wide product portfolio
Nutrial continues to expand its market presence

CHANNELS

Grocery retailers dominate, supported by private label options
E-commerce offers alternative purchasing channel

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025
Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025
Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

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